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ABSTRACT

This document describes the restructuring actions taken by the Lake Oswego School District in response to recent state legislation that significantly reduced resources for Oregon education. The first section presents the district's core beliefs, values, and areas of emphasis that define Lake Oswego's vision for 21st century education. Strategic planning principles for phased restructuring in the context of reduced resources are outlined, which integrate knowledge and understanding, skills and processes, and attitudes and attributes. District goals are to restructure and downsize to provide the highest quality educational program and services and the most value for the available resources. The roles of teachers and classified employees in the process are also described. The second section presents the district vision and focus planning documents and offers recommended change strategies. Section 3 highlights the guiding beliefs for different education levels and effective practice documents. The final section provides 1992-93 documents outlining district goals and strategic priorities. One figure and a school board restructuring calendar are included. (LMI)

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LAKE OSWEGO 7J

SCHOOL DISTRICT

Lake Oswego School District
Response to the Impact of Measure Five:
A Three Phase Strategic Plan

Restructuring

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EA 024 494

Lake Oswego School District
Response to the Impact of Measure Five:
A Three Phase Strategic Plan

Vision for the Future
in the Lake Oswego School District

Vision Statement

The Lake Oswego School District is an exceptional school district with a strong commitment to the value of education to our community and society. Our expectations are high, but we possess the means with which to realize those expectations. Our district is characterized by talented educators, able students, caring parents, and a supportive community -- conditions that place almost any accomplishment within our collective grasp. The challenge is in developing a school district with the will and power to improve and grow, where today's vision of what is possible can become tomorrow's reality.

1. Learning
   To develop a school district where learning, both for students and for educators, is clearly the primary value influencing decisions and actions.

2. Instruction
   To develop a district with a comprehensive vision of instruction which includes a variety of learning approaches appropriate to a variety of specific learning outcomes.

3. Participation
   To develop a school district where processes are clearly in operation which support the assumption that better quality decisions occur when the creativity, innovativeness and decision making ability of the people within the organization are utilized.

4. Climate
   To develop a school district where high levels of trust, pervasive caring, and respect for the dignity and worth of the individual are clearly evident, including the accepting and valuing of divergent feelings and opinions.

5. Leadership
   To develop a school district where the talent, expertise, creativity and enthusiasm of administrators and teachers are engaged in organizational roles focused on improving learning and instruction.

Graduate Profile for the 21st Century

At the direction of the School Board, citizens at large, advisory committee members, teachers and administrators contributed ideas about what knowledge, skills and attitudes are critical for students to possess as they graduate from high school in the 21st century. Those ideas, summarized below, will assist us in establishing the fundamental values underlying our instructional program.

The intent of this section is to present core beliefs, values and areas of emphasis which define our vision for the well-educated Lake Oswego graduate of the 21st century. While this vision is presented in three parts, Knowledge and Understanding, Skills and Processes, and Attitudes and Attributes, we recognize that successful performance in any discipline requires the integration of knowledge, skills and attitudes. We also believe that this vision applies to all students, and implies a climate of high expectations for everyone. See Figure 1.

Strategic Plan for Restructuring in the Lake Oswego Public Schools

Principles of Strategic Planning

Several strategic planning principles have been applied with good result to district projects over the past few years. We believe that these principles continue to be relevant to our current planning efforts and that they provide solid guidance in our planning processes. They are as follows:

Improvement

An organization that is not improving is not keeping pace with a rapidly changing world and thus is, relatively speaking, becoming worse.

Vision

An improving organization requires vision, a kind of foresight about the ideal and the attainable based upon the real and the desirable.

Framework

An organization that is uncertain of its vision, beliefs, values, and goals is largely incapable of strategic improvement.

Empowerment

The district must encourage and support the sharing of organizational power if the talent, creativity, and decision-making ability of the entire school community is to be meaningfully involved in the district's improvement efforts.

Figure 1

District Program Vision Statement: Graduate Profile for the 21st Century

The District's vision for the well-educated Lake Oswego graduate of the 21st century is defined by the knowledge, skills, and attitudes indicated by the Graduate Profile for the 21st Century. This vision applies to all students and requires a District norm of high expectations.

Knowledge and Understanding
Students will attain the broad cultural literacy which provides the background necessary to understand the pst and present, and provides the perspective needed to shape the future. It includes the knowledge necessary to interpret and learn from personal experience and appreciate the aesthetic dimensions of life.

Organization of Knowledge *(systems, interrelationships, and language structure and function).*
Global Studies *(world history, geography, culture, and social science).*
Citizenship *(U.S. history, geography, government, economics, and multiculturalism).*
Humanities *(literature and fine arts).*
Math concepts *(arithmetic, geometry, algebra, statistics, and measurement).*
Sciences *(physical, life, earth, and environmental).*
Health *(mental, physical, wellness, preventive, and community).*

Skills and Processes
Students will acquire the abilities to interact with the world, express themselves, access information, recognize and solve problems, and live and work successfully with others.

Communications *(reading, writing, speaking, and listening).*
Thinking *(critical, creative, and reflective).*
Math operations *(computations, problem solving, and applications).*
Scientific Method *(observation, hypothesis development, and experimentation).*
Foreign Language *(reading, writing, speaking, and listening).*
Technologies *(computers, telecommunications, and other productivity-improving tools).*
Interpersonal Skills *(group process, conflict resolution, collaboration, and cooperation).*
Personal Management *(time management, task organization, and study skills).*

Attitudes and Attributes
Students will develop beliefs and personal characteristics necessary for a successful life as indicated by a balanced lifestyle, self-discipline, self-awareness, interdependent relationships, and commitment to causes larger than themselves.

Exhibits respect for self and others.
Empathizes with others from different backgrounds/respectful of diversity.
Is aware of effect of actions on self and others now and in the future.
Commits to learning and personal improvement.
Displays strong work ethic.
Pursues a healthy lifestyle.
Responds and adapts to change.
Accepts civic and social responsibilities.
Makes responsible and ethical choices.

Congruence

Effective system-wide improvement requires a congruence of vision and actions: a vision which is clear, engaging and attainable and actions which support the accomplishment of that vision.

Balance

Effective organizational improvement requires balance, a dynamic tension between complementary forces which define and strengthen one another, stimulating organizational growth.

Challenge	Support
Independence	Interdependence
Collaborative Teaming	Individual Initiative
Innovation and Change	Status Quo and Stability
Strong Centralized Direction	Site-Based Management
Process	Product
Task	Relationship

Conditions Driving Restructuring -- The Problem

We have entered a period when all that is certain is that we will have fewer resources spread over some indeterminate period of time with which to pursue our goal of providing a very high quality education for every child enrolled in the Lake Oswego Public Schools. We know that we will be a smaller organization spending less money to serve more students.

We are facing difficult, even painful times under the revenue constraints of Measure 5. Our outstanding educational system is at risk. We are likely to lose programs we have spent years developing. We are also likely to lose people who have been dedicated, hardworking employees. Service levels will decline. Some opportunities for students will decrease or completely disappear. More will be asked of parents. Sacrifices will be required from all.

Creativity, flexibility and determination will be needed to emerge from this transitional period with a focused, effective, and highly competitive program. We believe that we have the employees, parents and the community at large that will be needed to meet the severe tests that lie ahead.

Assumptions Guiding the Strategy

Several important assumptions drive our strategic planning efforts. They all focus on sustaining our competitive edge in providing the kind of education our community requires, even in a time of declining revenues.

1. We will improve program while reducing costs, restructuring to create a new whole rather than retrenching by reducing service levels or by simply eliminating some of the parts.

2. We will strive to "fix what isn't broken," committing to improving efficiency and effectiveness throughout the entire organization.

3. We will improve our competitive advantage through increased cooperation, collaborating and sharing resources among schools, with other districts, and with the community at large.

4. We will do "what's best for kids" by also doing what's best for adults, empowering people to shape the conditions for effective change.

5. We will add value to decrease costs, investing wisely now in improvements that will reduce future operating costs.

6. We will generate creativity and flexibility out of our position of strength and stability, building from our core values and beliefs.

7. We will recognize and overcome the biggest barrier to our success -- ourselves, pushing the limits in order to grow, to adapt, to learn, to change.

Overview of Program Beliefs and Principles

The Importance of Learning

Learning will remain our central purpose. This is obviously true for students. Less obvious, yet still very important, is the role that learning must also play for our organization as a whole. Now, more than ever, we must be a learning centered organization at all levels with a strong commitment to renewal, growth and continuous improvement.

In this regard, we will continue to value and develop our models of teaching approach, including the following concepts:

Teaching

a) Teaching is behavior which increases the probability of learning.
b) In an ideal learning environment, the teacher is both teacher and learner, and the student is both learner and teacher.

Integrated Vision of Instruction

a) There are many effective skills, strategies, and models for good teaching, but because of the dynamic, ever changing nature of the classroom there are no blueprints.
b) Effective teaching is dependent upon a comprehensive and integrated vision of instruction:
   1) a repertoire of instructional approaches appropriate to a variety of specific learning outcomes;
   2) ability to choose approaches which consistently increase the probability of learning in each particular situation;
   3) skill in implementing those approaches.

Also of critical importance during this period of transition will be the leadership provided by district administrators at all levels. Some key concept include the following:

Administration

a) Administrators provide the leadership that inspires and engages others in focused cooperative efforts toward district-wide improvement.

b) Through participatory processes, administrators share power. Administrators will at times be both leaders and followers, modeling each of these roles for others in the organization.

c) Administrators actively seek collaborative relationships with others, recognizing the teamwork needed to achieve positive, lasting organizational changes.

d) Through focus and selection of high leverage activities, administrators empower others and build the climate needed for high performance work groups to flourish.

e) As instructional leaders, administrators contribute to the learning organization by providing instruction, either to adults or students, sharing their considerable expertise and reinforcing our core values of teaching and learning.

Restructuring by Level

As we approach restructuring, one fundamental principle must receive attention. We must continue to enroll all or nearly all the students who live within our district. A nationwide interest in educational "choice" initiatives compounded by our own need to down size program because of funding could lead to our inability to retain students, both at risk and our most able students. We must guard against this in our restructuring plans. While we down size, we must also create programs that are second to none in the Portland metropolitan area. In business terms, we must maintain, if not expand our market share

and be prepared to compete vigorously in an environment that could well have many more competitors vying for our students.

So, as we attempt to improve program, stay competitive in the educational marketplace and reduce costs significantly, it has become apparent that we need to design a new whole rather than simply down size the existing pieces. The following beliefs, assumptions and principles guide our design efforts.

District wide

We will work to apply the principles of high performance work groups throughout the district. These groups are characterized by the absence of rigid hierarchy, highly skilled participants who have flexible roles and responsibilities, collaborative work relations and shared responsibility for results. Using this method of organization, we will work to sustain quality as the total number of employees diminishes.

Professional development needs will increase as we involve people in planning, implement new forms of organization, restructure programs, re-deploy our human resources and strengthen the ability of individuals to participate in high performance work groups. We will invest heavily in the education and training needed to successfully implement new programs and practices. A comprehensive plan for professional development will provide teachers with the support they will need to become proficient with a variety of changes.

At the Elementary Level

We expect to retain the same basic pattern of organization that we currently have in grades K-6. However, we will explore new grouping practices, including the non-graded primary, that could help us improve program as resources tighten. We believe that class size is an important issue, particularly in the primary grades and will seek to sustain favorable class sizes accordingly. While academic instruction will remain our emphasis, we will also continue to serve students needing developmental assistance. Our early intervention strategy will be sustained with adjusted service levels in special education and enhanced counseling services applied to a broad range of student problems that can interfere with learning.

At the Secondary Level

We expect to retain our pattern of two junior high and two senior high schools, at least through the first two phases of restructuring. We believe that the benefits to students outweigh the organizational advantages of one large junior high and one large high school configuration. However, programmatically our secondary schools will all be different in the future as we work to reduce per pupil costs significantly while maintaining a high level of service in core academic areas. We see the period between seventh and twelfth grades divided into three, two year blocks, each with its own unique characteristics.

The Middle Grades (7 and 8) -- At grade seven, support will be provided to ensure a smooth transition from the elementary classroom experience. Students will participate in a strong core academic program including language arts, social studies, science and math. Affective education efforts will be strengthened to meet the needs of the early adolescent. Opportunities in foreign language and computer technology will be extended. A select group of electives will be provided to give students a chance to explore new fields of study as well as build on prior interests. Instruction will be hands-on, skills oriented and feature cooperative learning.

Eighth grade student experiences will be similar in nature to seventh grade, although scheduling and grouping practices will vary to provide the transition necessary as students mature and move to the differentiated environment of the high school.

At both grade levels, other educational experiences outside the school and even district will be pursued to ensure that all students continue to have access to a broad range of appropriate experiences. Additionally, these increased opportunities will help us better meet the needs of the academically able.

We will seek to sustain a high level of participation in athletics and activities. However, programs will need support from user fees and will receive less district subsidy.

High School -- A new era of cooperation will emerge between our high schools as they develop new programs. The high school will be divided conceptually between the first two grades and the last two, each level with its own curriculum emphasis. District graduation requirements will be changed to match State requirements and students will be provided with alternative ways to accomplish several of those requirements in an effort to individualize and strengthen programs of study.

Each high school will retain a core academic curriculum including language arts, social studies, math, science and foreign language. Beyond this, a number of magnet programs will be established to focus our available resources district wide. Elective programs will become more focused on areas that are congruent with the district vision statement - the Graduate Profile for the 21st Century.

Though the curriculum may be narrowed somewhat, we will strengthen areas which are preparatory to higher education enrollment and work to provide opportunities for students with more immediate plans to enter the workforce.

Partnerships with other districts and institutions of higher education will be undertaken to provide a range of learning opportunities that we could not provide on our own. Dual enrollment options with higher education will be pursued vigorously. Telecommunications options linking school sites with each other and extending the reach of the classroom beyond the district will be developed to add new opportunities for students.

Because of their high value to students, parents and the community, athletics and activities will continue to be supported, though user fees will be charged to help sustain these programs and district subsidies will be sharply reduced.

Grades 9 and 10 -- For the first two years of high school, students will participate in a strong academic core program during which the majority of graduation requirements will be met. Proficiency levels associated with core academic content areas will be established and students will be expected to demonstrate that they have achieved these levels. The foundation will be laid during this period for a program specialization decision that will be made prior to grade 11.

Grades 11 and 12 -- During the last two years, students will pursue individual programs designed to meet their college preparation or more immediate career plans. Based on interests and goals, students will be able to make choices that will better prepare them for the next step after high school, whatever that step may be. This "European plan" approach, more a form of flexible specialization than it is tracking, will help us focus resources more effectively, while enhancing the quality of educational experience for all students.

While a portion of each day will include instruction in a "home" school, it is likely that many students will spend part of the day at another campus within or outside the district. Partnerships with other districts, with community colleges, colleges and universities, and with businesses will enrich the learning opportunities for students. Other unique partnerships, with community theatres or foreign language immersion programs, for example, will be explored. School schedule changes and transportation enhancements will assist students in taking advantage of special opportunities.

At the same time that off campus opportunities expand, emphasis will be placed on helping students maintain strong identification with their home schools and their peer groups.

For students who are at risk of dropping out, we will explore a youth center concept which could combine elements of alternative education, cooperative work experience, and an integrated social services support model.

Strategic Plan -- Phased Restructuring

Down sizing and restructuring will proceed through at least three phases. Each phase corresponds to a resource level rather than a specific period of time. In Phase 1 we will position ourselves for the steep decline in resources that we will experience in Phase 2. Phase 2 will need to be undertaken because the property tax cap and state equalization of funding will become a reality. Phase 3 will need to be undertaken if revenue sources are not adequate to support our Phase 2 restructured program. The purpose of the Plan is to guide individual decisions throughout this period of uncertainty to ensure that our strategic restructuring goals are met.

The actions that will be taken within a phase will be implemented at various times throughout that phase. For instance, some actions may be implemented as soon as we enter a particular phase, while others may be implemented just as we are about to leave the phase. Consequently some actions could be separated from other actions in the same phase by one or more years. Most of each phase of the Plan would be implemented before moving on to reductions in the next phase.

Phase 1 Strategy - Positioning: We will begin system wide change to prepare us for a period of significantly reduced resources. In this phase, the changes will be gradual but comprehensive, using the natural changes of the organization to the greatest possible advantage. We will plan for greater restructuring and focus decisions on the future. We will begin the process of program consolidation and reorganization. Although teacher-student ratios will probably begin to rise, resources will continue to be concentrated on classroom instruction. Ratios will be set by level and discipline. Some low enrollment elective classes will be discontinued. User fees for optional activities and programs will begin to be implemented.

Our new elementary school will open, staffed in large part by using our existing district staff resources. This is true in areas such as administration, special services, music, TAG and physical education where existing resources will be spread over more schools.

Phase 2 Strategy - Restructuring: Through careful planning and program development, we will improve the quality of education for students in this phase, despite a reduction in resources and another probable increase in class size in most areas. Instructional programs throughout the District will become congruent with our vision statement for student graduates of the 21st century. The program changes described in the section, **Restructuring by Level**, will be implemented in all elementary, junior high and high schools.

Administration will be reduced, leading to increased collaborative problem solving and interdependence among the remaining team members. Some certified and classified staff will be reassigned to implement new program structures. Many professional development opportunities will be provided to assist staff in successfully mastering changes.

Operational and Instructional Support functions will be reduced and focused on key activities and goals. High performance work group philosophies and practices will be used throughout the district.

Participation in athletic and activity programs will remain high, though significant user fees will be needed to ensure that an ample range of options remains available. Staffing in these areas will be lean and focused.

Phase 3 Strategy - Austerity: Our focus will continue to be the core academic program. Class sizes will probably rise to near maximum levels. We will need to further modify and

down size programs because we will not be able to continue to afford the Phase 2 improvements. The elementary services model will change and we will consolidate secondary programs, resulting in just one junior high and one senior high school.

Reductions will continue in administration and support groups forcing additional narrowing of focus and activity. Athletics and activities will be severely reduced.

SYSTEM-WIDE DOWNSIZING AND RESTRUCTURING ASSUMPTIONS AND PROCESS

The Problem The passage of Ballot Measure 5 has necessitated reshaping the Lake Oswego School District to respond to a significant reduction in resources.

The Goal Our goal is to reshape the Lake Oswego School District through a combination of downsizing and restructuring.

Two Primary Objectives Our two primary objectives are first, to provide the highest possible quality educational program and services, and second, to provide the most value for the available resources.

Two Ways To View Change The district has defined downsizing and restructuring as distinct concepts. However, the need to significantly reduce spending by the 1993-94 school year accentuates the interrelatedness of all budgetary and program decisions; thus, downsizing and restructuring cannot be effectively separated.

CHANGE

DOWNSIZING: CHANGE AS NECESSITY	RESTRUCTURING: CHANGE AS OPPORTUNITY
Changing programs and services to reduce costs by consolidation, reduction, and elimination, focusing on the most efficient and effective utilization of resources.	Changing programs and services by shaping systems and practices to focus on the most effective and productive means of accomplishing the district vision for the graduate of the 21st century.

The Givens

1. The final outcome of downsizing and restructuring will be consistent with the district Restructuring Plan (including the Graduate Profile Policy) and the Oregon Educational Act for the 21st Century.
2. The district will restructure programs from the inside out, first establishing the instructional conditions necessary to provide the programs and services determined to be most essential.
3. Once the district establishes the personnel required to teach the programs and services determined to be most essential, the district will be able to design the rest of the instructional program within the constraints of the available resources.
4. Restructuring will include the investigation of current research and the identification and incorporation of effective practices or "best" practices in the areas of instruction, curriculum, and assessment.
5. Restructuring may include any or all of the following: revising or eliminating current programs, implementing new programs, changing the required/elective status of courses, and altering the format for academic offerings and extracurricular opportunities.
6. Both downsizing and restructuring decisions will be incorporated into the 1992-93 school district budget.
7. All downsizing and restructuring efforts must be completed and the programs and services in place for the beginning of the 1993-94 school year.
8. The programs in the district are all part of one large system, requiring all program and service decisions to be made in relation to the overall whole rather than being seen as isolated choices.
9. Cocurricular and extracurricular offerings will continue to serve many students.
10. Assuming sufficient funding, our current four secondary school and nine elementary school structural configuration will be maintained.

Decision Making

The Board of Directors will make all policy and program decisions relating to downsizing and restructuring:

1. By necessity, the Board must make decisions throughout the process, establishing "givens" from which to develop the restructured whole; and
2. The Board is responsible for making final program decisions.

The Superintendent will make policy and program recommendations relating to downsizing and restructuring:

1. Recommendations will be made throughout the process, establishing "givens" from which to develop the restructured whole; and
2. The Superintendent will make a final recommendation on each program, taking into consideration the programs and services of the entire school district.
3. District administrators will assist the Superintendent in the formulation of recommendations.

TO BE ACCOMPLISHED

TEACHER EMPLOYEE PARTICIPATION

Establish Guiding Beliefs

Definition: For the purpose of program decision making, *guiding beliefs* are defined as the most central assumptions which comprise our vision of what the school experience should be.

Examples:

1. Guiding beliefs will be defined by teachers and administrators for inclusion in the restructuring recommendations.
2. The definition of guiding beliefs will provide a framework upon which to base restructuring decisions.

Establish Instructional Service Levels

Definition: For the purpose of resource allocation, *service level* is defined as the ratio of teachers to students in a program or service area.

Examples:

1. Service levels will be defined by first establishing the changes in instruction and learning outcomes projected by the expert judgment of teachers in relation to varying classroom conditions, including numbers of students.
2. The passage of Ballot Measure 5 has us facing a significant reduction in resources, and the establishment of service levels in any area, school, department, or program will affect what can be offered in all other areas and programs. With this understanding in mind, we will be asking for the expert judgment of teachers in helping the district establish service levels.

Establish Most Effective or "Best" Instructional Practices

Definition: For the purpose of program decision making, *best instructional practices* are defined as our most current understandings of effective educational practices in the areas of curriculum, instruction, and assessment.

Examples:

1. All subject matter and service areas will be asked to contribute input to the district effort to define best practices. Written statements will be developed by administrators and teacher leaders in consultation with teachers.
2. The definition of best practices will provide a framework for restructuring decisions in the areas of curriculum, instruction, and assessment.

Establish Student Requirements

Definition: For the purpose of program decision making, *student requirements* are defined as the content that students will be required to take.

Examples:

1. These requirements will take different forms, from subject matter time expectations at the elementary level to specific courses of study required at the junior high level to graduation requirements as well as the requirements for the Certificate of Initial Mastery and the Certificate of Advanced Mastery at the high school level.
2. Student requirements will be established consistent with the district Graduate Profile Policy as well as with state requirements, including the Oregon Educational Act for the 21st Century.

TO BE ACCOMPLISHED

CLASSIFIED EMPLOYEE PARTICIPATION

Establish Operating Conditions

Definition: For the purpose of program decision making, *operating conditions* are defined as the district's systems and procedures that will be utilized to manage the district's programs.

Examples:

1. **Downsizing and restructuring decisions must be made within the framework of the operating conditions, including such factors as transportation schedules, individual school schedules, and state-mandated requirements.**
2. **The district has the option to petition for a waiver from state standards.**

Establish Constraints of Downsizing and Restructuring

Definition: For the purpose of program decision making, the *constraints of downsizing and restructuring* are defined as the conditions resulting from a significant reduction in resources.

Examples:

1. **Downsizing and restructuring will be done within the context of a reduction in personnel and an increase in students, with the likely result that most school personnel will perform more diverse roles.**
2. **Because downsizing and restructuring will include the reduction of administrative and classified personnel, district management and support services will also be redefined.**

TEACHER PARTICIPATION IN DOWNSIZING AND RESTRUCTURING

Our district vision statement includes the following commitment to participation:

To develop a school district where processes are clearly in operation which support the assumption that better quality decisions occur when the creativity, innovativeness and decision making ability of the people within the organization are utilized.

Opportunities to Make Recommend-ations

1. Participate in the process to establish guiding beliefs
2. Participate in the process to establish service levels
3. Participate in the process to establish downsizing recommendations
4. Participate in the process to establish most effective instructional practices
5. Participate in the process to establish student requirements
6. Participate in the process to establish operating conditions

Teachers will not make recommendations to eliminate <u>specific</u> positions held by other teachers.

CLASSIFIED PARTICIPATION IN DOWNSIZING AND RESTRUCTURING

Our district vision statement includes the following commitment to participation:

To develop a school district where processes are clearly in operation which support the assumption that better quality decisions occur when the creativity, innovativeness and decision making ability of the people within the organization are utilized.

Opportunities to Make Recommendations

1. Participate in the process to establish downsizing
2. Participate in the process to establish operating conditions

Classified staff will not make recommendations to eliminate <u>specific</u> positions held by other classified staff.

SCHOOL BOARD RESTRUCTURING CALENDAR

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
13th - C.O.	10th - C.O.	9th - C.O.	6th - C.O.	4th - C.O.	8th - C.O.
	Core Academic Service Level (1992-93) - D	District-wide Downsizing - D Junior High Restructuring - D	Superintendent's 1993-94 Programs - R Elementary Junior High Senior High District Design Student Requirements Core Academic Service Levels	Board - 1993-94 Programs - D Elementary Junior High Senior High District Design Student Requirements Core Academic Service Levels	
27th - Westridge	24th - Palisades	16th - C.O.	20th - LOJHS	18th - LOHS	15th - C.O.
Core Academic Service Level (1992-93) - R	District-wide Downsizing (1992-93) - R Junior High Restructuring Committee - R	District-wide Downsizing - D Junior High Restructuring - D	Board Discussion 1993-94 Programs Elementary Junior High Senior High District Design Student Requirements Core Academic Service Levels		
					22nd - C.O.

R - Recommendation to the Board
D - Decision by the Board

LAKE OSWEGO SCHOOL DISTRICT
DOWNSIZING AND RESTRUCTURING

VISION AND FOCUS
PLANNING DOCUMENTS

LAKE OSWEGO SCHOOL DISTRICT
SYSTEM-WIDE DOWNSIZING AND RESTRUCTURING
SUPERINTENDENT'S RECOMMENDATIONS

The Problem The passage of Ballot Measure 5 has necessitated reshaping the Lake Oswego School District to respond to a significant reduction in resources.

The Goal Our goal is to reshape the Lake Oswego School District through a combination of downsizing and restructuring.

Two Primary Objectives Our two primary objectives are first, to provide the highest possible quality educational program and services, and second, to provide the most value for the available resources.

Two Ways To View Change The district has defined downsizing and restructuring as distinct concepts.

CHANGE

Downsizing:	*Restructuring:*
Change as Necessity	***Change as Opportunity***
Changing programs and services to reduce costs by consolidation, reduction, and elimination, focusing on the most efficient and effective utilization of resources.	Changing programs and services by shaping systems and practices to focus on the most effective and productive means of accomplishing the district vision for the graduate of the 21st century.

Recommendations The need to significantly reduce spending by the 1993-94 school year accentuates the interrelatedness of all budgetary and program decisions. Thus, because downsizing and restructuring cannot be effectively separated, all recommendations will combine elements of both downsizing and restructuring.

OUR SITUATION

For many years we have worked together to create the conditions for success within our district. Now forces from outside our community confront us: a financial crisis imposed by the passage of a statewide ballot measure, the political implications of international competition in the work place, and the public's legitimate demand for results-centered accountability. To respond successfully to the conditions that we are now confronting, we must

first, have a clear understanding of the major changes that have taken place, and

second, reconfirm our commitment to our fundamental values.

Our district Vision Statement delineates our fundamental values, which must continue to guide our change efforts. Thus, we have defined *restructuring* as "changing programs and services by shaping systems and practices to focus on the most effective and productive means of accomplishing the district vision."

THE PAST

PREVIOUS GOAL - To continue to produce an exceptional school district through our commitment to learning, instruction, participation, climate, and leadership.

PREVIOUS CONDITIONS:

1. **Resources.**
   Availability of resources allowed us to continue to improve programs and services through increased spending.
2. **Control.**
   The majority of the forces influencing decisions and actions came primarily from within the district and the community.
3. **Change**
   Our improvement efforts were primarily incremental changes designed to improve a system which was highly successful under the existing conditions.
4. **Competition.**
   We faced no significant competition for the human and financial resources necessary to sustain and improve our system.

THE PRESENT

CURRENT GOAL - To continue to produce an exceptional school district through our commitment to learning, instruction, participation, climate, and leadership.

CURRENT CONDITIONS:

1. **Resources.**
   Decreasing resources require that we continue to improve programs and services without increased spending.

2. **Control.**
   More of the forces influencing decisions and actions come from outside the district and the community.

3. **Change.**
   Dramatic changes in the existing conditions necessitate the reshaping of our systems and processes to respond to the new context.

4. **Competition.**
   We are now facing significant competition for the human and financial resources necessary to sustain and improve our system.

CHANGING STRATEGIES, NOT VALUES

Realizing an organization that is uncertain of its vision and core values is largely incapable of strategic improvement, we must now more than ever center on what we value most, narrow our scope and stay focused. We must build from strength to reshape our organization so that our school culture continues to become more collaborative, more innovative, and more learning-centered. Meaningful restructuring will necessitate change -- ***but change in our strategies, not in our core values.***

RESTRUCTURING STRATEGIES

1. **Narrow the focus and build from strength.**
   Concentrate on what we value most, making sure that we do those things extremely well.

2. **Simplify without oversimplifying.**
   With reduced resources, fewer employees and more students, we must reduce expectations and tasks to their essential elements.

3. **Recognize that less can be more.**
   Doing less can produce greater results when doing less means spending more time on fewer but more valued tasks.

4. **Strive for continuous improvement.**
   To shape the conditions for our success in a rapidly changing and competitive environment, we must continue to improve.

5. **Increase reliance on the talent and expertise available to us.**
   In addition to our professional staff, we have a well-educated, extremely talented community that values education and is willing to participate with us in providing an exceptional educational program.

PREDICTABLE BARRIERS

1. **Seeing the problem as outside of ourselves.**
   All of us will be affected by the changing conditions, testing our ability to work well together and to push our individual and collective limits -- to grow, to adapt, to learn and to change.

2. **Pendulum swings.**
   There is no one best way; the "best" usually lies in a synthesis of competing ways.

3. **Operating solely on the symptoms.**
   It is easy to overvalue short-term fixes that solve immediate problems rather than to address root causes that require long-term commitment.

4. **Oversimplification.**
   Complex, multidimensional problems require thoughtful analysis so that the solutions really do address the critical nature of the problem.

RESTRUCTURING RECOMMENDATIONS

These restructuring recommendations have been developed after an extensive community and district-wide effort to establish

a vision for the graduate of the 21st century,
guiding beliefs by program level,
effective practices by program level,
service levels by individual programs and teaching assignments, and
downsizing and restructuring recommendations for programs and services throughout the district.

The recommendations that follow represent an effort to combine the best thinking of the staff, the community, and the administration into an organized whole that can provide a basis for restructuring decisions.

DISTRICT VISION STATEMENT

The Lake Oswego School District is an exceptional school district with a strong commitment to the value of education to our community and society. Our expectations are high, but we possess the means with which to realize those expectations. Our district is characterized by talented educators, able students, caring parents, and a supportive community -- conditions that place almost any accomplishment within our collective grasp. The challenge is in developing a school district with the will and the power to improve and to grow, where today's vision of what is possible can become tomorrow's reality.

CORE VALUES

1. **LEARNING**

To develop a school district where learning, both for students and for educators, is clearly the primary value influencing decisions and actions.

Recommended Restructuring Strategies

1) The district should continue to develop as a **learning organization** that can adapt both quickly and effectively to changes in its environment as well as shape the conditions necessary for its long-term success. Characteristics of a learning organization include
   a. an openness to new ideas and a willingness to explore new possibilities;
   b. group learning which begins with dialogue -- the capacity of people to suspend assumptions and enter into a genuine thinking together; and
   c. a demonstrated commitment to innovation, growth, and improvement that allows adults to model the learning behaviors desired of students.

2) Students should be taught how to learn. The students' awareness and control of the frameworks, processes, and products of their own thinking (metacognition) is essential to **learning to learn**. Focus students' learning-to-learn strategies on the differences between behavioral and cognitive approaches to learning -- learning skills and recalling specific information requiring distinctly different strategies than learning for understanding by actively constructing knowledge. Continue to stress expressive learning with an active, engaged learner.

3) There should be a strong emphasis on the development of **academic foundation skills** in reading, writing and mathematics -- transferable foundation skills being taught directly at every level and integrated and reinforced throughout the entire curriculum.

4) While there should be a strong academic focus to our programs, there should also be a commitment to a **student-centered approach**, with programs and services designed to provide the support and academic challenges appropriate to the individual needs of a varied student population.

5) All of our programs should be designed to encourage students to work at the outer edge of their potential, including high expectations for learning, growth, and development in all areas of the **Graduate Profile for the 21st Century:**
   a. the broad cultural literacy which provides the background necessary to understand the past and present, and provides the perspective needed to shape the future. It includes the knowledge necessary to interpret and learn from personal experience and appreciate the aesthetic dimensions of life.
   b. the capabilities to interact with the world, express oneself, access information, recognize and solve problems, and live and work successfully with others.
   c. beliefs and personal characteristics necessary for a successful life as indicated by a balanced lifestyle, self-awareness, interdependent relationships, and commitment to causes larger than oneself.

6) There should be a strong emphasis on measuring program success in terms of student performance on authentic tasks, with curriculum, instruction and assessment activities focused on the **active expression and demonstration of student learning.**

7) The district learning environment should incorporate the wide range of **resources within the community**, including partnerships with parents and businesses, community service, and mentorships.

8) The **Certificate of Initial Mastery** should provide a central focus for all program development, K-12. To achieve the certificate, each student should be expected to demonstrate mastery of a select number of essential skills and demonstrate the ability to apply knowledge in several specific ways.
   a. Academics. The student should be
      1) **knowledgeable** -- able to demonstrate knowledge and understanding by applying essential concepts and processes as defined by the district, including how to learn and construct meaning; and
      2) **skillful** -- able to demonstrate specific skills in reading, writing, mathematics, and use of technology.
   b. Applied Academics. The student should be
      1) **self-determining** -- able to demonstrate the power, will and ability to take responsibility for one's self and one's own learning;
      2) **purposeful** -- able to demonstrate the ability to define a course of action, problem or goal, including its context, and then design, organize, and carry out strategies to achieve the defined purpose;
      3) **self-aware** -- able to demonstrate self-conscious reflectiveness by being able to express the interrelationships of the individual with other people and with the environment;
      4) **empathetic** -- able to demonstrate the ability to vary perspective, to recognize, to relate to and to appreciate differing points of view and value systems; and
      5) **responsible** -- able to demonstrate integrity, trustworthiness, and ethical judgment and behavior.

2. INSTRUCTION

To develop a school district with a comprehensive vision of instruction which includes a variety of instructional approaches appropriate to a variety of specific learning outcomes.

Recommended Restructuring Strategies

1) **Teaching** is behavior which increases the probability of learning. Effective teaching is dependent upon a comprehensive and integrated vision of instruction:
   a. a repertoire of instructional approaches appropriate to a variety of specific learning outcomes;
   b. ability to choose approaches which consistently increase the probability of learning in each particular situation; and
   c. skill in implementing those approaches.

2) The district should redefine the curriculum, developing an integrated approach to teaching knowledge and skills. Basic to any effort to integrate subject matter would have to be the establishment of a district perspective on the nature of knowledge, differentiating the learning of a skill or the memorization of information from learning with understanding - requiring the processing and constructing of new information in relation to what the student already knows and understands. An **integrated curriculum** based upon a "teaching for understanding" theory of knowledge would require the definition of essential learnings and key organizing concepts and frameworks to be taught for understanding, application, and transfer.

3) The district should continue its emphasis on the **teaching of thinking** -- independent self-directed thought being critical to human growth and development as well as critical to our way of life. Participation in democratic processes also depends upon one's ability to think: to evaluate issues, to reason to sound conclusions, and to make intelligent choices.

4) One important measure of the effectiveness of curriculum and instruction must be the learning outcomes demonstrated by student performance. **Authentic assessment** requires the development of a district-wide assessment model which includes the assessment of individual student performance on whole, meaningful, complex tasks in a simulated context or real-life setting.

3. **PARTICIPATION**

To develop a school district where processes are clearly in operation which support the assumption that better quality decisions occur when the creativity, innovativeness and decision-making ability of the people within the organization are utilized.

Recommended Restructuring Strategies

1) The district must continue to encourage and support the **sharing of organizational power** if the talent, creativity and decision-making ability of the entire school community is to be meaningfully involved in the district's improvement efforts.

2) All adults should be involved in developing and participating in activities which promote the attitude that people within the district are a **community of learners** and that there is significant potential for human growth inherent in the adult interaction within the school community.

3) The district should continue its commitment to **participatory decision making**, developing processes that encourage widespread input before major decisions are made, particularly from those who will be directly affected by the decisions.

4) We must continue to strive for a **congruence of vision and action**. The integrity of the district -- our demonstrating our beliefs and values through our behaviors -- is essential to people's willingness to participate in our improvement processes.

5) District programs and processes should be designed to foster **community involvement**, developing a partnership in which the community and the district both benefit from the sharing of resources and expertise.

4. **CLIMATE**

To develop a school district culture where high levels of trust, pervasive caring, and respect for the dignity and worth of the individual are clearly evident, including the accepting and valuing of divergent feelings and opinions.

Recommended Restructuring Strategies

1) The district should continue to strive for open, clear, and forthright **communication** throughout the district and to the entire community. Both individual and collective efforts to make successful contributions to the organization are largely dependent upon having essential information that is timely and accurate.

2) The district must continue to develop a system-wide culture that encourages **cooperation**, where individuals seek to complement and support one another. Characteristics of a cooperative school culture would include:
   a. a spirit of teamwork among all staff;
   b. group problem solving;
   c. shared decision making;
   d. team planning;
   e. peer sharing;
   f. a shared sense of responsibility

3) In addition to communication and cooperation, the district culture should emphasize **collaboration** -- the ability to think together through an open dialogue, deepening and clarifying understanding by sharing goals, insights, questions, and ideas while developing a shared sense of meaning. Dialogue requires that we
   a. seek to know and understand;
   b. suspend judgment;
   c. view others as colleagues; and
   d. value the thinking process.

5. **LEADERSHIP**

To develop a school district where the talent, expertise, creativity and enthusiasm of administrators and teachers are engaged in organizational roles focused on improving learning and instruction.

Recommended Restructuring Strategies

1) Focus the model of leadership on **creating the conditions for change** through dialogue, collaboration, shared decision making, and the engagement of collective energies to bring about innovation and productive change.

2) The district should continue to develop a **variety of leadership opportunities**, encouraging contributions from administrators, teachers, classified staff, parents, and the Lake Oswego community in both formal and informal roles.

3) In this time of uncertainty and rapidly changing environment, no single leadership quality is as important as **integrity**, which provides a central point of stability that encourages innovation and risk taking. We must continue to demonstrate our beliefs and values through our behaviors.

4) Effective organizational improvement requires **balance**, a dynamic tension between complementary forces which define and strengthen one another, stimulating organizational growth. District leadership must continue to value both strong centralized direction and site-based management, collaborative teaming and individual initiative, independence as well as interdependence.

INSTRUCTIONAL PROGRAM RECOMMENDATIONS

Our district's commitment to participatory processes requires the development of guiding assumptions or frameworks as the basis from which meaningful staff participation can define the specifics of design and implementation. To work this way, which allows us to develop the best program from the input of many people, requires collaboration and dialogue; it also requires thought -- the ability to move from the abstract to the concrete, from the general to the specific, from the complex to the simple.

These recommendations have been developed to guide decision making. The disadvantage of guiding recommendations is that they do not provide a blueprint which communicates exactly what staff must do. However, in a time of uncertainty and change, we must resist the temptation to jump to simple prescriptions which are not developed out of the best collective thinking that we can provide. The advantage of guiding recommendations is that they allow staff the opportunity to use their experience, insight, and creativity to develop the best approaches to implement the recommendations in relation to our beliefs and what we know about the most effective practices.

Elementary Level

The district is in the initial stages of restructuring the elementary program, having just completed the guiding beliefs statement. Additional elementary restructuring recommendations will be made following further study at this level. Extensive program development will take place in the months ahead.

1. The district should develop a differentiated staffing model at the elementary level, establishing criteria for defining varying teaching roles and responsibilities.

2. Age and grade level configurations should be expanded throughout the entire elementary school program to include single grade classrooms, combination classrooms, blended classrooms, and multi-age classrooms. District guidelines will be developed for each configuration.

3. Continuous progress, where students are taught at their rate and level of learning, should be implemented for all students in the academic foundation skills of reading, writing and mathematics.

4. The district should establish specific performance expectations in keyboarding and word processing for all students in the intermediate grades.

5. Media specialists should provide leadership in the implementation and application of technology in the elementary schools.

6. The district should examine the development of an integrated fine arts program which would include discipline based approaches to music, art, and drama.

Middle Level

Comprehensive restructuring recommendations for middle level education have already been presented to the Board of Directors. The Superintendent's current recommendations will be followed by additional recommendations as the staff studies the best means to implement the beliefs, practices, and recommendations approved for middle level program.

1. All middle level teachers should be actively engaged in the equivalent of six periods of student instructional time with differentiated staff roles and responsibilities by 1993-94. (This statement is made in reference to our current schedule, with the understanding that restructuring will most likely bring about significant changes in that schedule.)
   a. Differentiated staffing for supervision would necessitate the redefinition of various types of classified support roles.
   b. Differentiated staffing for teaching would necessitate the establishment of varied roles and responsibilities for instructional staff.
2. The middle level schedule should be designed to provide the staff with the best possible opportunities to accomplish our guiding beliefs, middle level practices, and restructured program.
3. Assuming that the current schedule will most likely be significantly changed through restructuring, the schedule should allow for best program delivery of state requirements, district requirements and the elective program.
4. The district should require the study and demonstration of specific performance expectations in keyboarding, word processing, and basic computer applications. The course should be the equivalent of one semester in length.
5. The district should require the study and demonstration of specific performance expectations in a discipline-based fine arts course. The course should be the equivalent of one semester in length.
6. The district should require the direct instruction of affective skills in a discrete course of study.
7. All elective courses in our secondary programs should be offered on the basis of student selection, guided by student interest, parent expectations, and staff recommendations.
8. The district should examine the role of basic classes in the instructional disciplines at the middle level, while continuing to place major emphasis on developing multiple strategies to assist and support low-performing students.
9. Major emphasis should continue to be placed on developing multiple strategies to provide instruction for talented and gifted students at their appropriate level and rate of learning.
10. The district should recommend one year of middle level foreign language, followed by at least two years of senior high foreign language, for students pursuing a college preparatory course of study.
11. The district should continue to offer programs providing opportunities for extensive participation as well as competition in athletics for middle level students.
12. The district should do a comprehensive re-examination of its activities programs and offerings for middle level students, focusing on providing more expanded offerings in cooperation with the Lake Oswego community.

High School Level

The district is in the initial phases of the high school restructuring effort, having developed the guiding belief and effective practice statements. Further recommendations will be made as extensive program development takes place over the next several months.

1. All high school teachers should be actively engaged in the equivalent of six periods of student instructional time with differentiated staff roles and responsibilities by 1993-94. (This statement is made in reference to our current schedule, with the understanding that restructuring will most likely bring about significant changes in that schedule.)
   a. Differentiated staffing for supervision would necessitate the redefinition of various types of classified support roles.
   b. Differentiated staffing for teaching would necessitate the establishment of varied roles and responsibilities for instructional staff.
2. A two-divisional configuration should be used to organize the high school program, one divisional organization being structured to meet the requirements of the Certificate of Initial Mastery, and one to meet the requirements of the Certificate of Advanced Mastery.

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3. A schedule should be developed consistent with the structures established for meeting the requirements of the Certificate of Initial Mastery and the Certificate of Advanced Mastery. The schedule should also be designed to provide the staff with the best possible opportunities to accomplish our guiding beliefs, effective high school practices, and restructured program.

4. Final assessments for freshmen and sophomores should focus on the performance expectations required for successful completion of the Certificate of Initial Mastery.

5. Final assessments for juniors and seniors should focus on the performance applications of the essential concepts and frameworks for successful completion of the Certificate of Advanced Mastery.

6. Develop additional program alternatives for students by defining options for the substitution of courses of study for designated state requirements.

7. Continue to offer a strong college preparatory academic program at each high school with different magnet programs applying to the Certificate of Advanced Mastery being located at each school.

8. Continue the establishment of magnet programs located at one of the two high schools, developing and specializing facilities for the unique nature of individual programs.

9. All elective courses in our secondary programs should be offered on the basis of student selection, guided by student interest, parent expectations, and staff recommendations.

10. Continue to expand the boundaries of the school experience by developing programs and awarding credit for learning experiences in the community. Credit would be granted for learning experiences such as community service and partner mentorships.

11. Examine the feasibility of establishing an additional alternative school program for students who require a different learning experience.

12. Examine the role of basic classes in the instructional disciplines at the high school level, while continuing to place major emphasis on developing multiple strategies to assist and support low-performing students.

13. Examine instituting district-wide instructional grouping practices for teaching students at varying levels of proficiency in the same classroom, allowing for the consolidation of low-enrollment specialty classes.

14. Examine alternatives for attracting academically motivated students from outside the district to participate in specialized programs and services on a tuition basis.

15. High school graduation requirements should be developed after defining the expectations for the completion of the Certificate of Initial Mastery and the Certificate of Advanced Mastery. To provide a student-centered, individualized program consistent with the new state expectations, the district should establish differentiated courses of study with differentiated graduation requirements.

Instructional Support Recommendations

1. Re-examine the roles and responsibilities of all instructional support staff to identify the essential services and to develop alternatives for cost reductions in relation to district-wide downsizing and restructuring decisions. For the purposes of these recommendations, instructional support staff include

    media specialists at all levels
    special services certificated staff
    talented and gifted certificated specialists
    counselors at all levels
    physical education specialists at the elementary level
    music specialists at the elementary level.

    A planned reduction of instructional support staff is not being recommended for 1992-93. However, the district must explore alternatives for cost reductions as well as prepare to respond to opportunities to reduce costs made available by "natural change" within the organization. A projected increase in enrollment will require current resources to serve more students in 1992-93.

2. Redesign the teacher leadership model at all levels to reduce costs and to shape the roles consistent with the program expectations under restructuring.

3. Expand the scope of the district inclusion practices for special education students currently being served outside the district and/or outside of the regular classroom program.

4. Continue to refine the district's eligibility criteria to coincide with legal responsibilities for learning disabilities, speech and language, and occupational and physical therapy services.

5. Expand the concept of the school district as a learning community to include learning partnerships with parents.

6. Redefine the TAG coordinator roles at all levels, increasing the expectation for consultant services and reserving direct services for those talented and gifted students whose needs cannot be met within the scope of the regular instructional programs.

7. Examine an expanded role of the Lake Oswego Educational Foundation as a means of providing more extensive financial support to the district's programs and services.

8. Develop a comprehensive professional development plan to support the change and improvement efforts associated with district-wide restructuring.

Athletics and Activities Recommendations

1. Develop guiding belief statements and effective practice statements upon which to base restructuring decisions.

2. Explore revising the joint use agreement with the City of Lake Oswego to include the shared management and possible integration of some of the district's athletic, activity and intramural programs with some of the city's parks and recreational programs.

3. Continue to develop a model for the management and supervision of athletics and activities programs consistent with the scope of our offerings and the most effective utilization of managerial resources.

Leadership and Management Recommendations

1. Examine the most effective and efficient means of providing administrative services throughout the district, including both the centralization and the decentralization of administrative responsibilities. Areas for study could include building operations, athletic and activities program management, evaluation of teachers, master scheduling, instructional leadership, and professional development activities.

2. Develop a revised model for the configuration and distribution of administrative roles and responsibilities, so that the talent and expertise of all administrators may be shared in more than one building and/or in district-wide roles.

3. Redefine and redistribute central office operational, managerial, and program responsibilities in order to accomplish critical tasks with reduced resources and personnel, including the elimination of the divisional organization at central office.

4. Examine the integration of roles and responsibilities of the central office administrator and the building administrator to best utilize expertise and strengths as well as to determine the most effective and efficient means of providing administrative services to the district. Areas for study should include instructional leadership, operational management, and across-building, across-district and/or multi-level assignments.

5. Redesign the administrative evaluation expectations and processes, clarifying new roles and responsibilities. More emphasis should be placed on self evaluation and the cooperative and collaborative skills necessary for system-wide restructuring.

6. Develop a system for evaluating the management of central office and of individual buildings, using a simple, clear set of improvement indicators applied district wide. In addition to the accomplishment of district and school goals, emphasis should be placed on specific indicators of school and district effectiveness.

7. Institute site councils in all schools by the end of the 1992-93 school year, developing a school governance structure that allows an effective coordination of the site council, the redesigned teacher leadership model, and the school improvement teams.

8. Examine the role of supervisors (e.g., maintenance, transportation, food service, business office manager, purchasing, business partnerships) to determine the most effective and efficient means of providing supervisory services throughout the district. Areas for study should include managerial roles and time distribution between direct and indirect providing of services.

Operational Support Recommendations

1. Develop a plan to initiate aggressive cost-effectiveness strategies in maintenance, transportation, and food services to provide only essential services in the most efficient manner during the 1992-93 school year.
2. Examine privatization of the food service, transportation, and maintenance programs, comparing the cost effectiveness and efficiency of our reorganized programs with those of private providers and preparing for changes in service delivery, if warranted, for the 1993-94 school year.
3. Explore cooperative ventures with the community college and other school districts where mutual benefit can be derived by sharing resources and facilities. The magnet program concept should be explored with other school districts.
4. Explore the joint use of services and the sharing of management with the City of Lake Oswego in areas where mutual benefit can be derived.
5. Examine the options with the City of Lake Oswego for the development and/or utilization of alternative sources of revenue to support programs of mutual benefit to the city and the school district.

LAKE OSWEGO SCHOOL DISTRICT
SYSTEM-WIDE DOWNSIZING AND RESTRUCTURING

The Problem The passage of Ballot Measure 5 has necessitated reshaping the Lake Oswego School District to respond to a significant reduction in resources.

The Goal Our goal is to reshape the Lake Oswego School District through a combination of downsizing and restructuring.

Two Primary Objectives Our two primary objectives are first, to provide the highest possible quality educational program and services, and second, to provide the most value for the available resources.

Two Ways To View Change The district has defined downsizing and restructuring as distinct concepts.

CHANGE

Downsizing:	*Restructuring:*
Change as Necessity	***Change as Opportunity***
Changing programs and services to reduce costs by consolidation, reduction, and elimination, focusing on the most efficient and effective utilization of resources.	Changing programs and services by shaping systems and practices to focus on the most effective and productive means of accomplishing the district vision for the graduate of the 21st century.

Recommendations The need to significantly reduce spending by the 1993-94 school year accentuates the interrelatedness of all budgetary and program decisions. Thus, because downsizing and restructuring cannot be effectively separated, both the February 24 downsizing recommendations and the April 6 restructuring recommendations will combine elements of both downsizing and restructuring.

THE DISTRICT'S FUNDAMENTAL APPROACHES TO SYSTEM-WIDE DOWNSIZING

NATURAL CHANGE STRATEGY

The district is committed to taking advantage of the natural change within the organization where positions are vacated through retirements and resignations. This strategy allows the district to downsize over a series of years and thus have the time to make better decisions, maintain a commitment to its own personnel, and lessen the magnitude of the impact of significantly reduced resources in any one year.

1. Where appropriate, the district will reassign current personnel to meet existing program needs, lessening the number of our own staff who will become subject to reduction in force.
2. When a position is vacated in any program or service area, the district will evaluate the position.
   a. The district will determine if an acceptable level of service can be provided by eliminating the position and reshaping service delivery, thus reducing costs.
   b. If the district determines that the position must be filled, existing staff will be evaluated to determine if a current employee can be appropriately transferred into the position.
   c. If the district determines that the position must be filled and cannot be appropriately assumed by an existing employee, then the district will hire outside the district to fill the opening.

PLANNED CHANGE STRATEGY

The district has developed a comprehensive, long-range strategic plan designed to change the organization in a series of phases through downsizing and restructuring. Decisions to change the organization, both its programs and its services, will be consistent with the district's long-range strategic plan, including the district's policy for the graduate of the 21st century, and the Oregon Educational Act for the 21st Century.

1. Downsizing and restructuring decisions will be made to redesign the school district consistent with the educational vision in the strategic plan while operating within the constraints of a reduced level of resources.
2. The district has decided to increase target staffing ratios for the 1992-93 school year. This strategy reduces the need to hire additional personnel as district-wide enrollment continues to increase and allows the district greater flexibility in positioning current staff, ultimately reducing reduction in force.
3. Downsizing and restructuring recommendations will be made both for implementation and for study and evaluation. Some decisions, being relatively convergent, will be simple and require little analysis while other decisions will be divergent, requiring extensive analysis and consideration of multiple options.

Recommendations for Management

1. Eliminate one Central Office administrative position being vacated by retirement and reorganize Central Office roles, redefining and redistributing operational, managerial, and program responsibilities.

2. Examine any future administrative vacancy which should occur within the district to determine if the position could be eliminated, reorganizing administrative roles and responsibilities.

3. Redefine and redistribute Central Office operational, managerial, and program responsibilities in order to accomplish critical tasks with reduced resources and personnel.
   a. Eliminate the divisional organization in Central Office.
   b. Locate Special Services administrative personnel and immediate support staff at Central Office.

4. Examine reducing the length of contract for some administrative positions, concentrating on defining and providing essential services in the most cost-effective manner.

5. Examine assigning classified employees to some responsibilities currently being performed by administrators but not requiring administrative certification.

6. Redesign the administrative evaluation expectations and processes, clarifying new roles and responsibilities.

7. Examine the most effective and efficient means of providing administrative services throughout the district, including both the centralization and the decentralization of administrative responsibilities. Areas for study could include building operations, athletic and activities program management, evaluation of teachers, master scheduling, instructional leadership, and professional development activities.

8. Examine the integration of roles and responsibilities of the Central Office administrator and the building administrator to best utilize expertise and strengths as well as to determine the most effective and efficient means of providing administrative services to the district. Areas for study could include instructional leadership, operational management, and across-building, across-district and/or multi-level assignments.

9. Examine the role of supervisors (e.g., maintenance, transportation, food service, purchasing, business partnerships) to determine the most effective and efficient means of providing supervisory services throughout the district. Areas for study should include managerial roles and time distribution between direct and indirect providing of services.

Recommendations for Operational Support

1. All Central Office operating budgets (e.g., business, maintenance, personnel, curriculum and instruction) are being reduced by 7.5% for 1992-93 as already approved by the School Board and the Legal Budget Committee.

2. Sell the Central Office mainframe IBM computer system and eliminate related service and operational costs.

3. Eliminate the Central Office computer operator/data processing secretarial position, requiring the reorganization and redistribution of Central Office support staff responsibilities.

4. As soon as physical accommodations can be made, move the Special Services administrative operations to Central Office, reorganizing and redistributing Central Office support staff responsibilities.

5. Continue reorganizing the roles and responsibilities of building level support staff by examining any opening to determine if the position should be eliminated or redefined.

6. Examine reducing the length of contract and/or number of hours for building level operational support staff, concentrating on providing essential services in the most cost-effective manner.

7. Examine placing major equipment purchases, such as instructional technology and school buses, and major maintenance costs, such as roof repair and facilities renovation, on a cyclical schedule to be paid for by a facilities and equipment bond.

8. Develop a plan to initiate aggressive cost-effectiveness strategies in maintenance, transportation, and food services to provide only essential services in the most efficient manner during the 1992-93 school year.

9. Examine privatization of the food service, transportation, and maintenance programs, comparing the cost effectiveness and efficiency of our reorganized programs with those of private providers and preparing for changes in service delivery, if warranted, for the 1993-94 school year.

10. Examine the continuation of centralization of operational support services, such as district mailing, if significant cost savings and/or more efficient service delivery can be realized--goals which have been achieved by the successful consolidation and reorganization of district printing services.

11. Examine the utilization of all district facilities, including increasing revenues by expanding the utilization of our facilities and by increasing rental fees.

12. Explore cooperative ventures with the community college and other school districts where mutual benefit can be derived by sharing resources and facilities.

13. Explore the joint use of services and the sharing of management with the City of Lake Oswego in areas where mutual benefit can be derived.

14. Explore revising the joint use agreement with the City of Lake Oswego to include the shared management and possible integration of some of the district's athletic, activity and intramural programs with some of the city's parks and recreational programs.

15. Examine options with the City of Lake Oswego for the development and/or utilization of alternative sources of revenue to support programs of mutual benefit to the city and the school district.

Recommendations for Instructional Support

1. Instructional support budget allocations are being reduced by 5%, prior to adjustment for enrollment, for 1992-93. This recommendation has already been approved by the School Board and the Legal Budget Committee.

2. The roles and responsibilities of all instructional support staff should be re-examined to identify the essential services and to develop alternatives for cost reductions in relation to district-wide downsizing and restructuring decisions. For the purposes of these recommendations, instructional support staff include:

   media specialists at all levels
   nurses and special services certificated staff
   talented and gifted certificated specialists
   counselors at all levels
   physical education specialists at the elementary level
   music specialists at the elementary level

   An extensive reduction of instructional support staff is not being recommended for 1992-93. However, the district must explore alternatives for cost reductions as well as prepare to respond to opportunities to reduce costs made available by "natural change" within the organization. A projected increase in enrollment will require current resources to serve more students in 1992-93.

3. All instructional support services provided by certificated staff at the building level should be examined to define what responsibilities can be assumed by classified personnel that do not require certification as the district continues to seek ways to provide essential services in the most cost-effective manner.

4. Contracted services for drug and alcohol counseling instructional support staff should be re-examined to identify essential services and to reduce costs in relation to downsizing and restructuring decisions. A projected increase in enrollment will require existing resources to serve more students in 1992-93. To maintain district financial support for the current level of service may require the district and the community to seek alternative methods of funding and/or provision of services for this program by 1993-94.

5. The district should discontinue funding for the police liaison officer and negotiate the sharing of services with the city to maintain the program.

6. The district should discontinue funding for the Multicultural Resource Center position, once again seeking volunteer support to continue the program.

7. The district should examine redesigning the teacher leadership model at all levels to reduce costs and to shape the roles consistent with the program expectations under restructuring.

8. Examine instituting fees for managerial services not required to support the regular program (e.g., early entrance testing fees).

Recommendations for Athletics and Activities

1. Freeze district supply and equipment allocations to athletic and activities programs at the 1991-92 level. A projected increase in enrollment will require existing resources to serve more students.

2. Redesign the current model for participation fees in athletics and activities, significantly increasing fees and emphasizing payment for participation in individual sports and activities.

3. Develop a plan to reduce secondary school coaching positions, continuing to reduce the percentage of district financial support to the athletic program.
4. Examine changing the status of some athletic and activity programs to club status, supported primarily by participants.
5. Examine the athletic and activities programs to determine at what levels and in what programs volunteer coaches and advisors could provide services to the district.
6. Eliminate intramural positions at all levels for 1992-93 and re-evaluate these services in connection with restructuring at each level.
7. Establish guidelines to limit travel for athletic and activity competition to the Portland metropolitan area and immediate vicinity.
8. Examine increasing pool fees and restructuring the program to increase participation, making pool operations more cost effective.

Recommendations for Instructional Program

1. Continue our commitment to restructuring the instructional program at all levels to provide the highest possible quality educational programs and to provide the most value for the available resources.
2. All building allocations are being reduced by 5%, prior to adjustment for enrollment, for 1992-93. This recommendation has already been approved by the School Board and the Legal Budget Committee.
3. The examination and differentiation of all instructional roles and responsibilities, including the nature and type of specific teaching assignments, will be addressed in the April 6 restructuring recommendations.
4. As previously approved by the Board of Directors, budget target staffing ratios are being increased in core academic programs at all levels (i.e., elementary--25:1, junior high--26:1, senior high--26:1).
5. Examine assigning classified support staff, rather than certificated staff, to student supervisory responsibilities where appropriate and not requiring certification.
6. Examine the establishment of additional magnet programs located at one of the two high schools (e.g., establish a specialized district site for such programs as auto mechanics, business office practices, art, drama).
7. Examine the consolidation of performance groups (e.g., a district orchestra).
8. Adjust all instructional support staffing FTE to individual school populations and student needs being served (e.g., learning disability specialist time, physical education specialist time).
9. Establish a minimum class size for all secondary school elective offerings.
10. Examine alternative approaches to making the high school summer school program self supporting, including downsizing the program by focusing on remedial studies and make-up course work or upsizing and expanding the program to increase revenue through out-of-district tuition.
11. Examine alternative approaches to making the elementary summer school program more cost effective by focusing the program on primary age students' remedial study of fundamental skills in math, reading, and writing.
12. Examine eliminating basic classes in the instructional disciplines at the secondary level, utilizing alternative strategies to assist and support low-performing students.
13. Examine instituting a district-wide strategy to utilize multilevel elementary classes as an alternative, both for providing flexibility in grouping practices and for preventing class sizes from reaching undesirable levels.
14. Examine instituting district-wide instructional grouping practices for teaching students at varying levels of proficiency in the same classroom, allowing for the consolidation of low-enrollment specialty classes.
15. Examine alternatives for attracting students from outside the district to participate in specialized programs and services on a tuition basis.
16. Examine an expanded role of the Lake Oswego Educational Foundation as a means of providing more extensive financial support to the district's programs and services.

LAKE OSWEGO SCHOOL DISTRICT
PROGRAM RESTRUCTURING

GUIDING BELIEFS AND EFFECTIVE PRACTICES
FOUNDATION DOCUMENTS

GUIDING BELIEFS
FOR
ELEMENTARY EDUCATION

ELEMENTARY **CURRICULUM** SHOULD:

Involve a continuum of learning goals and objectives based on the essential knowledge and understandings, skills and processes, and attitudes and attributes as identified in the Graduate Profile for the 21st Century.

Address the needs of the total child, be developmentally as well as age-appropriate, and learner centered.

Encourage independent, lifelong learners by emphasizing higher level thinking, decision making, problem solving, self-evaluation, and risk taking.

Be relevant, engaging, and meaningful to the learner.

ELEMENTARY **INSTRUCTION** SHOULD:

Support the success of the individual learner, accommodating the broad range of abilities, needs, and interests.

Be student centered, promote higher level thinking, encourage self-direction and independent learning.

Employ a variety of teaching techniques and strategies consistent with effective practices supported by current educational research.

ELEMENTARY **ASSESSMENT** SHOULD:

Be aligned with and reflect the goals and objectives of the curriculum.

Employ a variety of tools and techniques to measure developmental progress, discrete skills, attitudes, concept attainment, and meaningful applications of learning.

Be ongoing to allow for the monitoring of individual student growth and progress as well as the evaluation and adjustment of instruction.

Require students to engage in reflection and self-evaluation.

Be shared with students, parents, and community in ways that facilitate understanding and goal setting.

ELEMENTARY SCHOOL **ENVIRONMENT** SHOULD:

Promote high academic, behavioral, and social expectations which are clearly communicated to students, staff, parents, and community.

Promote a climate where teaching and learning are valued and recognized within the school community.

Foster respect, trust, and collaboration among and between all members of the school community: students, staff, and parents.

Reflect and encourage the development of social responsibility.

Provide a setting which is safe, clean, orderly and inviting.

ELEMENTARY **PARTNERSHIPS** SHOULD:

Actively involve parents, the community, public agencies, and local businesses as resources to support the education and well-being of elementary students.

Have as their foundation ongoing and relevant communications between participants.

Be based on a shared commitment and responsibility between parents and schools and be dedicated to the educational and personal success of all students.

Promote the positive interaction of both students and teachers within and between grade levels and schools.

GUIDING BELIEFS
FOR
MIDDLE LEVEL EDUCATION

GUIDING PRINCIPLES:

All aspects of the program should address the characteristics and needs of the whole child: intellectual, emotional, social, and physical.

Program decisions should be driven by the present and future needs of the middle level student and be based on developmentally appropriate educational practices.

The program should provide a safe and structured transition from the social and academic setting of the elementary school to that of the high school.

BELIEFS ABOUT **CURRICULUM**: Middle level curriculum should

be designed to help students to acquire the knowledge and understanding, skills and processes, and attitudes and attributes identified in the Graduate Profile for the 21st Century.

be articulated with the elementary and secondary curriculum.

be comprehensive and include a variety of exploratory opportunities.

be built around intellectually challenging, rich content and designed to help students deal with increasing levels of abstraction and complexity.

promote both an acquisition of in-depth knowledge and an understanding of how key concepts, generalizations, and skills from one discipline relate to other disciplines.

provide opportunities to make choices or pursue individual interests and abilities.

BELIEFS ABOUT **INSTRUCTION**: Middle level instruction should

emphasize active and expressive learning and be designed to allow for physical activity, "hands-on" experiences, and creative expression.

include varied strategies, settings, activities, and groupings.

be designed to meet a wide range of individual differences: learning styles and modes; intellectual and creative abilities; and stages of development (intellectual, psychological, social, physical).

allow for skills to be taught within meaningful contexts and applied and reinforced in many curricular areas and in real-life situations.

employ strategies which engage students in complex, valued, authentic tasks.

BELIEFS ABOUT **ASSESSMENT**: Middle level assessment should

emphasize high expectations which are explicitly communicated to all students.

be based on a variety of learning outcomes, including products, portfolios, and performances.

include opportunities for self-assessment and peer feedback.

be used to evaluate student progress, improve instruction, and make program decisions.

BELIEFS ABOUT **GUIDANCE AND SUPPORT**: The middle level program should

include affective education and counseling as integral parts of the total school experience, incorporating academic advising, monitoring, and personal support.

provide each student with an adult advocate and the services of other student support systems.

provide opportunities for all students to succeed and receive positive recognition from both adults and peers in a variety of areas—academic, social, behavioral.

include programs which foster a supportive home-school partnership.

BELIEFS ABOUT **PHYSICAL ACTIVITY**: The middle level program should

integrate physical activities into the curricular, instructional, and activities components of the total program and accommodate a wide range of abilities.

provide a variety of structured activities which offer constructive outlets for energy and promote development of motor skills.

BELIEFS ABOUT **SOCIALIZATION**: The middle level program should

provide opportunities for students to interact with peers in academic and social settings.

provide opportunities to participate in school and community activities which promote participation, interaction, and service.

provide opportunities to build positive relationships with adults.

provide opportunities for students to be increasingly responsible for themselves and their own learning.

GUIDING BELIEFS
FOR
SENIOR HIGH EDUCATION

Curriculum

The curriculum should

help students acquire the knowledge and understanding, skills and processes, and attitudes and attributes identified in the Graduate Profile for the 21st Century.

help students make connections, see relationships, and apply learning by incorporating interdisciplinary approaches and by integrating concepts and skills across disciplines.

help students acquire the knowledge and develop the skills needed to become good decision makers, problem solvers, critical thinkers, and communicators.

present a global perspective, enabling students to understand their relationship to the changing world.

address the intellectual, social, emotional, ethical, and physical development of students in partnership with parents and the community.

include diverse offerings which reflect the goals of the community and help students to grow as individuals.

Instruction

Instruction should

be a cooperative effort with students assuming shared responsibility for directing their own learning.

include a variety of teaching strategies and models which engage students actively and address students' diverse learning styles and needs.

reflect the diverse roles of the teacher as one who serves as a resource, facilitates learning, and disseminates information.

incorporate appropriate technology to enhance the learning process.

reflect high expectations, be challenging, and engage students in higher level thinking.

Assessment
Assessment should

employ a variety of strategies, including self-assessment and performance-based assessment, that measure a variety of learning outcomes.

be based on demonstrated proficiency, knowledge of content, and application relative to the goals of the curriculum and instruction.

provide regular feedback that will evaluate and report progress and promote further learning.

Environment
The environment should

be positive and supportive, promoting good citizenship, a sense of belonging, and a climate of respect and tolerance for individual differences.

reflect a clear set of standards and expectations for behavior.

support learning as the primary value and offer all members of the school community opportunities to learn and develop.

provide opportunities for collaboration and teaming throughout the school community.

provide a safe, inviting, orderly educational setting with appropriate facilities and resources.

foster a cooperative effort among teachers, students, parents, and community.

EFFECTIVE ELEMENTARY PRACTICES

Climate

Relationships among all members of the school community reflect respect for individuality, diversity, and differing points of view. The school norm is one of cooperation and teaming, where responsibility and decisions are shared. Students experience a safe environment where discipline focuses on developing a sense of personal responsibility. Each school has a unique personality and identity that fosters procedures, traditions, and celebrations for effort and accomplishments of students and staff.

Parent and Community Partnerships

The school invites the participation of parents and the community in the education of children. Parents are given opportunities to learn about and help shape quality education efforts. Continuous open dialogue between the home and the school supports active partnerships with parents. Volunteer efforts, fund raising, and business partnership activities are ultimately aimed at supporting student learning. The school initiates connections and collaboration with the community and appropriate public agencies.

Affective Education

The school provides students with opportunities for personal and social growth. Students learn and use communication and conflict resolution skills. Participation in a variety of experiences enhance students' self-awareness and personal expression. Students value individual differences and learn to work as a team. Students are challenged to develop a set of personal values that promote wellness and a balanced lifestyle.

Curriculum

The foundation skills of reading, writing, and mathematics are emphasized in a meaningful context and move toward an integrated conceptual curriculum. The curriculum reflects a balance of prescribed content and student interest. There are systematic opportunities for developing global and cultural awareness. Curriculum continuity exists between grade levels and disciplines. In order to address the developing nature of the elementary child, the curriculum extends beyond the classroom, exposing students to other learning opportunities.

Instruction

Instruction includes a variety of strategies selected to meet specific learner outcomes and individual student needs. Approaches to instruction take into account developmental levels, learning styles, and individual differences in ability and rate of learning. Instruction is based on the goals and objectives of the curriculum and is designed to promote active, expressive learning.

Assessment

Assessment is viewed as an ongoing integral part of the learning process in which a variety of developmentally appropriate tools is used to measure student growth. Assessment makes use of both formal and informal tools including portfolios, demonstrations, observations, criterion referenced tests, standardized tests. Assessment is aligned with curriculum goals, learning activities, and reporting needs. The focus is on student demonstrations that require reflection and indicate understanding and application of desired skills, concepts, and attitudes. Opportunities for learning self-evaluation skills are provided for students.

Grouping

Student placement is primarily heterogeneous with opportunities for homogeneous ability grouping where appropriate to the instructional objectives and the assessed needs of the learner. Membership of like ability groups is both fluid and dynamic.

Professional Development

In an era of rapid change, professional development provides opportunities for educators' ongoing growth. Professional development is aligned with and supports district direction and current educational research on effective teaching practices.

Support for Student Learning

Opportunities to support student learning exist both inside and outside the classroom. Resources and personnel are available to meet the needs of the whole child through intervention, counseling, remedial instruction, broad-based experiences, and appropriate challenge.

Technology

Elementary students receive explicit instruction in the use of technology from technically proficient teachers. Opportunities are provided for ongoing student use of these various technologies as tools to enhance their learning.

EFFECTIVE MIDDLE LEVEL PRACTICES

The instructional program is characterized by academic rigor, high expectations, and an active role for the learner. The curriculum is made meaningful by integration, cross-disciplinary connections, whole tasks, personal interests and concerns, and real-life application. Assessment would reflect these characteristics.

Students would spend a significant portion of the school day with a consistent group of peers sharing an interdisciplinary team of teachers. This portion may be longer for grade seven than for grade eight.

The amount of time scheduled for instruction with an intact group of students would be of such length that it would allow for flexible and differentiated use to best match desired instructional outcomes.

Student placement for instruction would be primarily heterogeneous with opportunities for homogeneous ability grouping where appropriate to the instructional objectives. Such groupings would be fluid and dynamic.

Student success and development of self-esteem would be supported by an adult advocate/advisor, instruction in affective skills and understandings, availability of counseling services, and a nurturing school environment.

Constructive outlets for the physical needs of the middle level student would be provided by both a learning environment that includes hands-on experiences and interaction with peers, as well as by physical education, activities, and athletics.

Students would be exposed to a broad-based exploratory program which includes the arts, technology, life skills, and applied academics. They would also have opportunity to pursue in-depth study reflecting student interests and talents.

A diverse extra-curricular program would provide the student many opportunities for participation, personal connectedness, student recognition, service, accomplishment, and socialization.

EFFECTIVE HIGH SCHOOL PRACTICES

Curriculum

A core curriculum, defined by a set of learning outcomes and objectives, provides opportunities for connections within and across disciplines. The curriculum should be flexible and dynamic, reflecting a rapidly changing world. Organized to promote student thinking, problem solving, and creativity in accomplishing whole tasks, the curriculum should reflect academic rigor and high expectations.

Instruction

Instruction should include a variety of instructional approaches appropriate to a variety of learning outcomes. Learning should be primarily active and expressive, including both individual instruction and group activities. Concepts and skills identified in the Graduate Profile for the 21st Century should be integrated within a meaningful context and reinforced within and across disciplines. Instruction should implement continually updated strategies which make use of emerging effective technology.

Assessment

Assessment strategies should be aligned with stated objectives of the curriculum and instruction. Clearly stated criteria should be shared with students/parents/colleagues. A variety of strategies should include performance based, authentic whole tasks, such as portfolios, projects and presentations, which require students to manipulate information, apply concepts and skills, and demonstrate proficiency.

Support for Student Learning

Structures and resources should be in place that support student learning outside the context of the regular classroom environment: instructional resource areas, materials, time for individual teacher-student interaction.

Grouping

Student placement should be primarily heterogeneous with opportunities for homogeneous ability grouping where appropriate to the instructional objectives.

Scheduling

Flexible and differentiated use of time should accommodate a variety of instructional, curricular, and assessment needs.

School Climate

Planned, systematic, collaborative, schoolwide student support and advisory systems should be an integral part of the overall program. Relationships among all members of the school community should reflect open communication and should model respect for the individual and appreciation for diversity.

Extracurricular Program

Diverse extracurricular opportunities should be accessible to a broad range of students. Such programs should be directed toward increasing students' self esteem, leadership abilities, and commitment to strive toward personal excellence as well as group improvement. When programs involve competition, emphasis should be on fair play.

School Governance

The approach to school governance should include clearly defined roles for students and adults. Collaborative problem solving and participatory decision making should be the norm. Efforts to solve problems and make decisions should include the people who are responsible for carrying out the tasks. Effective school governance assumes regular and systematic communication among groups.

Community Relationships

To promote a more tolerant, global outlook, the program should offer students a diversity of experiences within and beyond the local community, including community service. Instructional programs should be designed to foster a shared sense of responsibility with and for the community, so that students benefit from a wide range of resources and expertise. The connection among the school, community, and workplace should provide avenues for students that would not otherwise be available to teenagers, such as internships and mentorships.

Professional Growth

The school community should be organized to promote collegiality within and across disciplines. It should also encourage the continuing growth and development of the professional staff to address the educational goals of the school.

LAKE OSWEGO SCHOOL DISTRICT
1992-93 STRATEGIC PLANNING

DISTRICT GOALS AND STRATEGIC PRIORITIES
1992-93 DOCUMENTS

VISION STATEMENT

The Lake Oswego School District is an exceptional school district with a strong commitment to the value of education to our community and society. Our expectations are high, but we possess the means with which to realize those expectations. Our district is characterized by talented educators, able students, caring parents, and a supportive community—conditions that place almost any accomplishment within our collective grasp. The challenge is in developing a school district with the will and the power to improve and to grow, where today's vision of what is possible can become tomorrow's reality.

1. **Learning**

   To develop a school district where learning, both for students and for educators, is clearly the primary value influencing decisions and actions.

2. **Instruction**

   To develop a school district with a comprehensive vision of instruction which includes a variety of instructional approaches appropriate to a variety of specific learning outcomes.

3. **Participation**

   To develop a school district where processes are clearly in operation which support the assumption that better quality decisions occur when the creativity, innovativeness and decision making ability of the people within the organization are utilized.

4. **Climate**

   To develop a school district culture where high levels of trust, pervasive caring, and respect for the dignity and worth of the individual are clearly evident, including the accepting and valuing of divergent feelings and opinions.

5. **Leadership**

   To develop a school district where the talent, expertise, creativity and enthusiasm of administrators and teachers are engaged in organizational roles focused on improving learning and instruction.

1992-93 DISTRICT GOALS

GOAL I: DISTRICT

The district will continue implementation of a comprehensive, long-range organizational Restructuring and Downsizing Plan, concentrating on building and shaping an exceptional program which will serve more students with fewer resources.

General Objectives

1. To continue to base district-wide downsizing and restructuring decisions upon the fundamental beliefs, values and priorities established in district policy, the district's long-range strategic plan and the district's restructuring and downsizing plans.

2. To continue our commitment to statewide leadership by supporting and actively participating in Oregon's effort to restructure public education in accordance with the Oregon Educational Act for the 21st Century.

3. To continue to encourage cooperative and collaborative participation so the talent, creativity, and decision-making ability of the entire school community can be meaningfully involved in the district's restructuring efforts.

GOAL II: SCHOOLS

All schools will continue to develop and implement a school improvement plan, incorporating the district's restructuring and downsizing goals and strategies.

General Objectives

1. To continue to develop and employ participatory processes in a collaborative effort to accomplish school-wide improvement.

2. To develop and implement a revised model for school leadership which incorporates the district's restructuring priorities and the requirements of the Oregon Education Act for the 21st Century.

3. To utilize the fundamental beliefs and effective practice statements developed by teachers and administrators in the district's restructuring efforts as a basis for school-wide decision making and problem solving.

GOAL III: LEARNING ENVIRONMENT

All district programs will begin to place a greater emphasis on measuring program success in terms of student performance on authentic tasks, with curriculum, instruction, and assessment activities focused on the active expression and demonstration of student learning.

General Objectives

1. To begin the designing of outcome-based assessment tasks which require higher order thinking in individual student performance on whole, meaningful, complex tasks.

2. To begin the identification and definition of essential learnings in accordance with the district's development of a model for the Certificate of Initial Mastery.

3. To continue to encourage and support professional sharing among teachers in developing a repertoire of instructional strategies appropriate to a variety of specific learning outcomes.

STRATEGIC PLANNING 1992-93

Improvement

An organization that is not improving is not keeping pace with a rapidly changing world and thus is, relatively speaking, becoming worse.

Vision

An improving organization requires vision, a kind of foresight about the ideal and the attainable based upon the real and the desirable.

Framework

An organization that is uncertain of its vision, beliefs, values, and goals is largely incapable of strategic improvement.

Empowerment

The district must encourage and support the sharing of organizational power if the talent, creativity, and decision-making ability of the entire school community is to be meaningfully involved in the district's improvement efforts.

Congruence

Effective system-wide improvement requires a congruence of vision and actions: a vision which is clear, engaging and attainable and actions which support the accomplishment of that vision.

Balance

Effective organizational improvement requires balance, a dynamic tension between complementary forces which define and strengthen one another, stimulating organizational growth

Challenge	Support
Independence	Interdependence
Collaborative Teaming	Individual Initiative
Innovation and Change	Status Quo and Stability
Strong Centralized Direction	Site-based Management
Process	Product
Task	Relationships

Areas of Emphasis

1. **Restructuring the Organization**
2. **Instructional Leadership**
3. **Organizational Balance**
4. **Collaborative Relationships**

Organizational Priorities

Organizational Development
Learning organization
Professional development
Site councils

Instructional Program
Active learning
Integrated curriculum
Outcome based assessment

Leadership Agenda
Managing change
Collaborative problem solving
Cooperative teaming

Negotiations
Shared vision and commitment
Collaborative bargaining
Problem-solving focus

Resource Management
Comprehensive planning
Cost effectiveness
System-wide downsizing

District Culture
Trust, caring and respect
Shared decision making
Supportive relationships

Elementary Restructuring
Guiding beliefs and effective practices
Mixed-age groupings
Certificate of Initial Mastery

Junior High Restructuring
Guiding beliefs and effective practices
Interdisciplinary teaming
Certificate of Initial Mastery

Senior High Restructuring
Guiding beliefs and effective practices
Certificates of Initial & Advanced Mastery
Program Requirements

GOALS FOR IMPROVEMENT OF LEARNING

Curriculum

To develop and define a comprehensive curriculum made meaningful for students by organizing concepts, cross-disciplinary connections, whole integrated tasks, and the incorporation of personal interests and concerns.

Instruction

To develop and define a comprehensive vision of instruction which includes a variety of instructional approaches appropriate to a variety of specific learning outcomes and which promotes an active, expressive role for the learner.

Assessment

To develop a variety of strategies to assess student progress which reflect the ongoing, integral role of assessment in learning and which include measures of higher order thinking and student performance on authentic, whole tasks.

Leadership

To develop a model for administrators, teachers, classified staff, and patrons which engages the talent, expertise, creativity, and resources in efforts focused on the improvement of learning and instruction.

Environment

To develop safe and orderly schools which foster respect and tolerance for individuality and diversity, support collaboration and teaming, encourage trust, caring, and respect, and convey high expectations for all students.